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First European Discussion Forum on General Aviation

On the 8th of March 2007, for the first time since the creation of the common aviation market, the European Commission held a special event dedicated entirely to discussing the current state of General Aviation in the European Community.

Over sixty participants representing European and international general aviation associations, European Parliament, EC Member States, Eurocontrol, European Aviation Safety Agency (EASA), European Civil Aviation Conference (ECAC) and different services of the European Commission met in Brussels to discuss current developments and challenges facing this increasingly important sector of civil aviation.

The event was part of the consultation process that is being held by Directorate General for Energy and Transport of the European Commission, on the basis of a special Discussion Paper and which aims at analysing the need and possible means of improving the EU policy making regarding General Aviation.

In his opening speech, Mr. Daniel Calleja Crespo, Director of the Air Transport Directorate in DG TREN, highlighted that civil aviation is not only airlines and airports but also numerous small and medium operators that play their role in the life of European citizens and contribute to the success of the EU economy.

The meeting consisted of two sessions. In the morning representatives of different organisations and associations as well as experts from Member States and EASA presented their views on current challenges and developments in the General Aviation sector. In the afternoon session, representatives of the EC Member States, Eurocontrol, EASA, and ECAC discussed on the possible way forward. The summary of the presentations given during the morning session are in the Annex to this Report.

The Forum underlined the numerous functions that General Aviation can play, including:

- A major contribution to the EU economy (enhancement of enterprises' productivity and also a major manufacturing industry)

- Provision of additional transportation solutions for individuals and companies;
- Provision of working places on its own and of qualified aviation staff to the airline industry;
- Provision of specialised services also for the general public (emergency transportation, fire fighting, map charting, environmental patrolling and research etc.);
- Sport and recreation – also for the disabled and economically disadvantaged;

The Forum showed that General Aviation forms a significant and important part of the Community aviation industry and contributes to the social and economic success of the European Union. According to different sources it can be estimated that in Europe alone, about 30.000 – 50.000 general aviation aircraft are in use. Most of the General Aviation operators and companies are relatively small and comprise mainly SMEs.

The Forum also showed that General Aviation has specific needs that have to be taken into account in the law and policy making process (both at national and at European level) and that this segment of aviation is undergoing a big evolution and faces a number of challenges:

- Business aviation is developing twice as fast as the traditional commercial airline sector;
- New products are appearing on the market (fractional ownership, jet cards etc.) – some of them also raising questions as to their legal nature;
- New technologies are being developed (Very Light Jets or the future civil use of Unmanned Aerial Vehicles);
- General Aviation is confronted (as commercial aviation) with capacity problems. This results in increased competition for infrastructure between different categories of users;
- Protection of environment and sustainable development becomes increasingly important also for the General Aviation;

Stakeholders recognised that the timing of the event was very good as numerous regulatory and policy making initiatives are ongoing at the Community level and the outcome of the consultation process on General Aviation can be subsequently taken on-board in those other areas. Support was also expressed for the Discussion Paper on General Aviation published by DG TREN on 1st of February 2007.

The Forum also allowed for the recognition of various, but so far independent, initiatives undertaken by different European bodies concerning General Aviation – Eurocontrol studies on business aviation, ECAC research on definitions and fractional ownership, EASAs concept for better regulation in general aviation etc. Subsequent actions will be built on these initiatives.

The services of the Commission received a good feedback on the main issues identified in the Discussion Paper on General Aviation. The Forum confirmed the need to concentrate the future work in particular on:

- More systematic data gathering, including safety trends, necessary to improve the understanding of the sector and enhance the quality of the rulemaking affecting General Aviation. On this particular issue the European Civil Aviation Conference (ECAC) **agreed to undertake a study that would aim at identifying the actual sources of information currently available and developing a common format for future data gathering.** This could be subsequently converted into a European database from which all the interested parties, including safety regulators, could draw.
- Clarification of some definitions to ensure legal certainty. This is already being addressed within the context of extension of EASA competences to flight operations, flight crew licensing and safety of third country aircraft. In the area of economic regulation, the revision of the 3rd package of liberalisation will offer further possibilities if necessary. **One of the practical consequences of these initiatives will be to clarify the outstanding issue of the legal nature of fractional ownership operations;**
- The need to have **segmented Impact Assessments within the rule-making process in order to ensure the proportionality and differentiation of regulations affecting different categories of undertakings and airspace users.** This point is closely interrelated with the problem of data gathering identified above. Policy makers and regulators need to have access to reliable data that will facilitate the law making process.
- Addressing the capacity constraints and challenges in full involvement with non - commercial operators as they form a significant part of airspace and infrastructure users. Concrete proposals were provided by the stakeholders - including the need to **take into account the value of the wide network of General Aviation airfields and landing sites in Europe.**
- **Environmental impact of general aviation** to ensure sustainable development of all the segments of civil aviation. This includes proposal on the **promotion of good practices for aircraft noise managements in the urban areas and comments on the impact of the Commissions' proposal to include aviation in the Emission Trading Scheme on operators of small private aircraft.**

Further steps

All the stakeholders present during the meeting were invited to provide the Commission with official comments by 1st of April 2007 at the latest. On the basis of the comments received further work will be undertaken with the possible view of adopting a Communication on General Aviation by the end of this year.

The following presentations were given in the morning session:

European Council of General Aviation Support

Presentation focused on the value that the general aviation is bringing to the EU industry. It highlighted that even when used for recreational or sport purposes private aircraft need proper industry support in terms of maintenance, spare parts and associated services. ECOGAS presentation also explains that general aviation supporting industry is mainly small and medium enterprises and therefore the proportionality of regulations is of utmost importance. In its presentation ECOGAS gave also an overall overview of the trends in the EU general aviation sector and addressed the respective areas of aviation safety, ATM, environment and security.

International Council of Aircraft Owner and Pilot Associations - Europe

In its presentation, the European branch of the IAOPA, explained how diversified general aviation is and how numerous roles it plays - ranging from private transportation, through aviation training to public services including emergency transportation and environmental support. IAOPA-Europe presentation again recognised that general aviation is mainly small and medium enterprises and therefore the segmentation of Impact Assessments is necessary when developing regulations. Of particular importance was the suggestion to recognise the value of the wide network of General Aviation airfields and landing sites in Europe. Some suggestions were also offered on how the negative impact of aircraft noise on local communities can be mitigated.

European Business Aviation Association

EBAAs presentation gave an overall overview of the current state of business aviation in the European Community and allowed all the participants to see the reasons behind the enormous growth of this kind of services both in Europe and worldwide. It was explained that although from a regulatory point of view business aviation can be both commercial and non-commercial, the reasons for business aircraft usage are always the same. In EBAAs opinion there is no need to be concerned at this moment with the impact of Very Light Jets on the European ATM system as this is mainly a US phenomenon. Particular attention was given to problems that business aviation is experiencing in access to European airports and US market. Moreover some views were provided on the impact of the recent European Commission's proposal on the inclusion of aviation into the Emission Trading Scheme (a higher Maximum Take-Off Mass threshold was proposed).

Europe Air Sports

The light end of the General Aviation sector was represented in particular by Europe Air Sports, which in its presentation explained the specificities of this segment of aviation. EAS called for recognition of the sport and recreational aviation needs in future rulemaking and asked for more "self regulation" in the light-end segment (national aviation administrations were encouraged for continuation or

establishment of "Assessment Bodies" and recognition that additional risks are inherent in air sports activities). Rule-makers were also called to re-brand the (to be introduced) "Leisure Pilots Licence" as "(European) Light Aircraft Licence".

Dassault Aviation

Dassault Aviation gave an overall overview of the current state of play in the "heavier end" of the European General Aviation manufacturing industry. The presentation highlighted the importance of the US market for the EU general aviation manufacturing industry as most of the European business aviation products cross the Atlantic. The impact of new business aviation products – such as fractional ownership – was addressed, showing how these new market evolutions stimulate the growth of the general aviation manufacturing industry.

International Council of Aircraft Owner and Pilot Associations - Headquarters

Participants of the Forum also had the possibility to listen to a presentation given by Secretary General of the International Council of Aircraft Owner and Pilot Associations, who in his presentation gave detailed explanations on how general aviation is perceived in the USA and what are the reasons for its dynamic development across the Atlantic. Specific parts of the presentation were devoted to the current debate on the new FAA funding scheme and its possible impact on the US General Aviation. Some ideas were offered on how European General Aviation could be better integrated into the overall air transportation system.

Strategic Review of General Aviation in the UK

In 2006 the UK Civil Aviation Authority prepared two special reports dealing with General Aviation – one focused on regulatory matters (Regulatory Review) and one dealing with strategic assessment of the sector (Strategic Review). The Chairman of the Strategic Review of General Aviation in the UK explained in detail both the process that led to adoption of the report as well as its main findings. Strategic Review of General Aviation in the UK showed that General Aviation as such is a very diverse sector – and bigger in economic terms than originally thought. The report also found that contrary to popular belief General Aviation in the UK was not in a decline.

Federal Ministry of Transport, Building and Urban Affairs, Germany

In her presentation, the representative of the German Ministry of Transport, Building and Urban Affairs explained the current legal framework for General Aviation in Germany with specific emphasis on the regulatory functions delegated from the central government to the Federal States and Air Sports associations. Statistics were also provided regarding the economic value of German General Aviation sector as well as safety trends and impact on the employment market.

French Civil Aviation Authority

Presentation of the French Civil Aviation Administration focused on the legal framework, safety trends as well as social and economic value of the General

Aviation sector. The presentation showed that in France, the ultra light and business aviation are developing very fast while the more traditional private aviation is in decline. Increasing costs of operations (also deriving from the regulations) and capacity constraints were indicated as main obstacles to growth. The French deregulated regime for ultralight aircraft was presented as a model contributing to enhancement of the safety in the light-end segment of General Aviation.

European Aviation Safety Agency

In its presentation, EASA gave a detailed overview of its concept for better regulation in general aviation and its philosophy of proportional and differentiated rule-making. Presentation covered extension of EASA's competences to flight operations, crew licensing as well as airworthiness issues and specific actions that are being taken or envisaged in the direction of light sporting aviation. Proposals on the "recreational pilot license", concept for European new light aircraft category as well as future oversight regime for fractional ownership operations in Europe were addressed amongst the others points.
